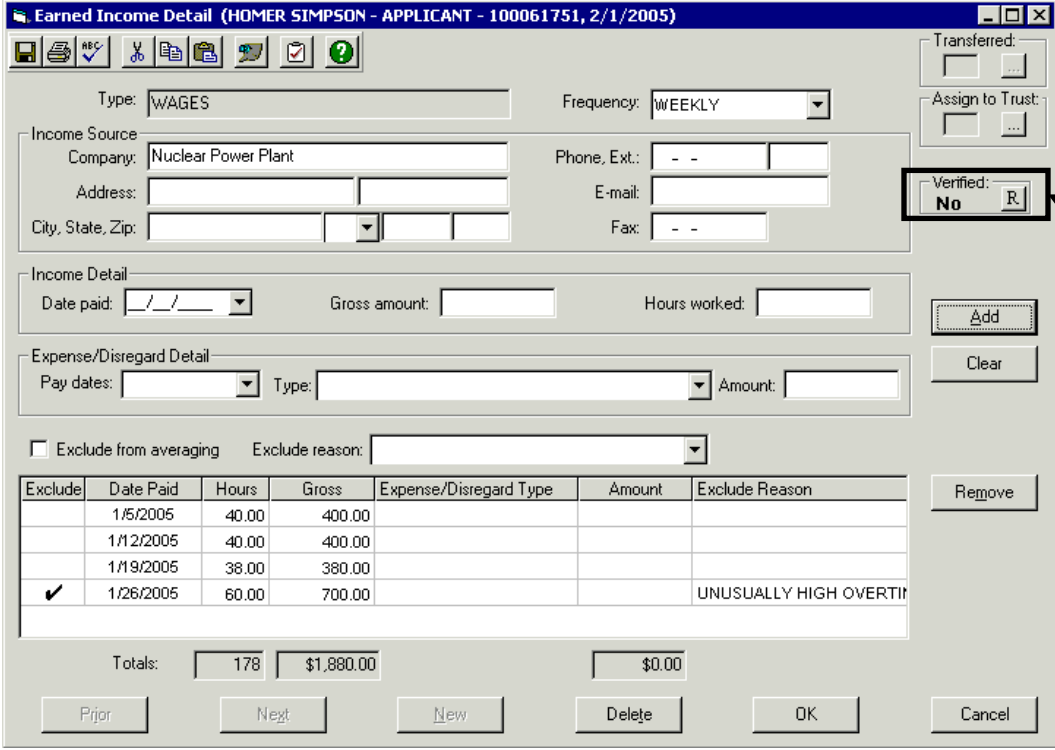# Request for Information

1. Introduction

Request For Information (**RFI**) is the method used to notify the customer or representative of verification needed by the Specialist in order to determine the customer's eligibility. The **RFI** also informs the customer or representative of the due date the needed items are to be received by the local office. ACE allows you to re-print the **RFI** and provide an extended due date on the form.

Throughout a case, the Specialist may add forms, comments, or instructions to the **RFI** from a **Verification Detail** window.

2. Including Forms on the RFI from a Verification Detail Window

The **Verification Detail** windows are used to include forms that are in ACE, on the **RFI**. To open a **Verification Detail** window, click on the **"R"** in the Verified: No R box.

In the **Form** grid, located in the **Verification Detail** window there is a ❑ (check box) that allows you to include a statement on the **RFI** that a specific form is required. The **Form** grid identifies the appropriate form for that specific verification and if the form is in ACE. In the example below, the **Description** is **Wages** and the

verification form ACE generates is the **Verification of Employment**.

Not all forms used for eligibility are in ACE.

When you click **Include Form on RFI** ❏box a ✔ (check mark) will appear and the form (for example Verification of Employment) is included on the **"Forms for Signature"** section of the **Request For Information**.

- **Due**   This field is automatically filled with 10 business days after sending the RFI to be printed.

- **Resolved**   Enter the date the verification form is received back from the customer or representative.

- **Print Form**   To print the verification form, click the **Print Form** button which sends the form to the print queue allowing you to mail the form with the **RFI**.

A few examples of forms seen in ACE are:

If a form is not in ACE, the **Form** grid is blank.

Form

☐ Include Form on RFI   Due: [   ]   Resolved: [__/__/____] ▼

[Print Form]   [   ]

The **Request For Information** grid has a ❑ (check box) allowing you to include a statement on the **RFI**. To include an item, place a ✓ (check mark) in the ❑ (check box).

The next grid is the **Request For Information**. **Request For Information** is the printed form that instructs the customer of all the items that need to be provided or verified.   This is the method of providing the customer with a written list of verification required in order to determine the customer's eligibility. The RFI also provides the customer with a date by which the requested verification must be received by the specialist.

Verification Detail (MARGE SIMPSON - APPLICANT - 100061752, 2...)   _ ☐ ✕

[toolbar icons]

Description: WAGES

Qualifier: Target

Value: $200.00   Verified: **Yes**

Verification

Date: [__/__/____] ▼   ☐ [Collateral]   ☐ [Document]

Client Statement: ☐   ☐ [Visual]   ☐ [Declaration]

Form

☑ Include Form on RFI   Due: [   ]   Resolved: [__/__/____] ▼

[Print Form]   VERIFICATION – EMPLOYMENT

Request For Information

☑ Include Verification on RFI   Due: [   ]   Resolved: [__/__/____] ▼

Instructions: ● English   ○ Spanish

A copy of pay stubs or a letter from the employer that shows the gross amount of income for the month(s) of May.

Comments

1/5/05 Left message for customer at home phone #.

[OK]   [Cancel]

Request for Information

Include Form on RFI

The **Instructions** field allows you to complete the instructions to the customer indicating the items they must provide. In the example, you would want to add what months the verification of wages is needed. This grid provides the opportunity for you to request specific information to be included on the **Request For Information**. The **Instructions** field is a free form field allowing you type in the needed information or complete the generic language automatically put in this field.

The generic text in the **Instructions** field can be toggled between English and Spanish by selecting the appropriate radio button.

!	**Note:** The correspondence language on the **Address** tab drives the language that the information in the **Instructions** field goes out in. If you have a Spanish-speaking primary informant, and you want add text to the **RFI**, you will need to type it in Spanish in this field.

Instructions Field

- **Comments** ACE allows you to add comments. These comments do not print on the **RFI**. They should be used to clarify information within the case.
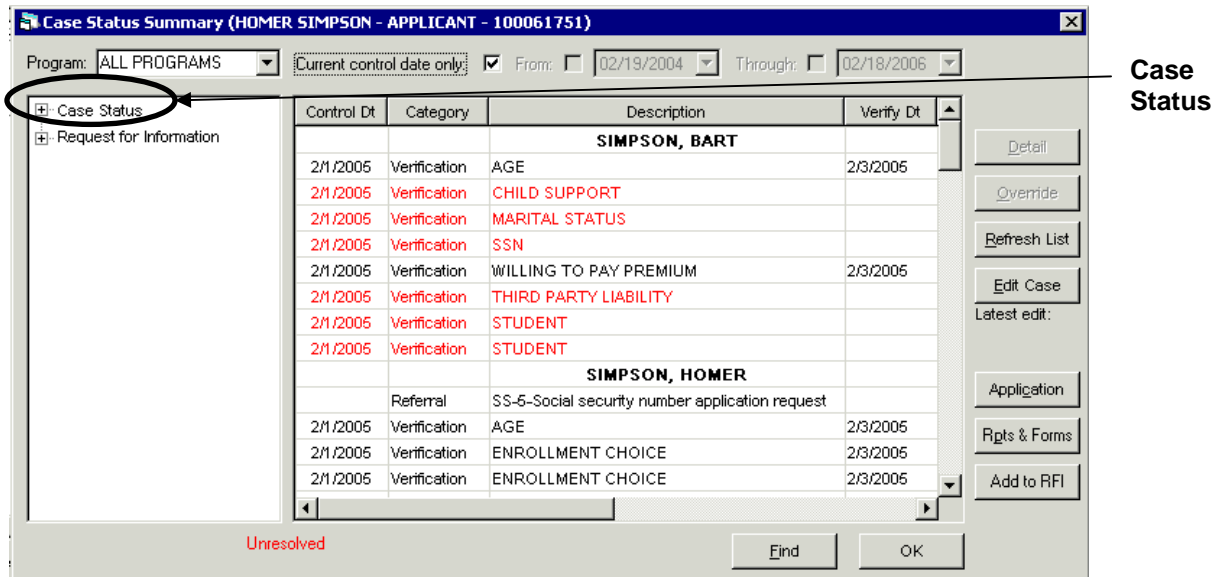

After completing all the information on a Detail pop-up window, click **OK** to save the information, and close the window. Clicking **Cancel** closes the window, and does not save the information.

3. RFI on the Case Status Window

To locate the **"Case Status Summary"** window click on **"Work"** on the main menu. Locate and click on **"Case Status"** on the drop down menu.

When you first view the **Case Status Summary** window in the **Case Status Summary** grid, you will see a **+** (plus sign) to the left

of the words Case Status (⊞ Case Status). The **+** (plus sign) indicates there are additional directories within the **Case Status**.

To view the **Request for Information**, place the cursor directly on the **+** (plus sign) located to the left of **Request for Information** and click.

Case Status displaying group members

Request for Information

The **Request For Information** on the **Case Status Summary** window provides a list of forms and verifications that have been included on the RFI.

In the example below, the RFI includes forms and verifications requests. To view forms only, click on **Form**.

Form

To view the verifications included on the **"RFI",** click on Verification.

Verification

4. Sending the RFI to Print Queue

The process of sending the **RFI** to the **Print Queue** begins on the **Case Status Summary** window. When you have included all items needed on the **RFI**, click on the **Rpts & Forms** (Rpts & Forms) button.

Rpts & Forms

The **Print Report** window will open. The **Print Report** window contains two grids.

The first field on the **Print Report** window is the Applicant field, which defaults to the customer's name.

The first grid on the **Print Report** window is the **Print Reports.** It contains the following fields:

- **Reports**   Provides a list of the items available to print. Select **Request For Information**.

- **Due Date**   ACE defaults to a due date of 10 working days from the date the **Request For Information** is selected and sent to the **Print Queue**.

- **Print**   Clicking on the **Print** buttons sends the selected item (**Request For Information**) to

the **Print Queue**.

The second grid on the **Print Report** window is the **Print Forms**. It contains the following fields:

- **Form**   Provides a list of the items available to print.

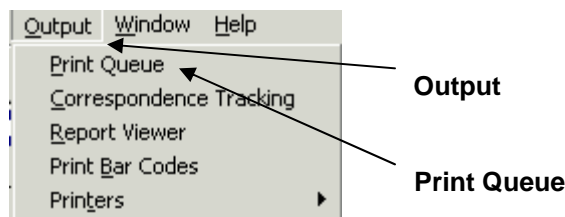- **Detail**   Opens the **"Form RFI Detail"** window.

Once you have selected and sent the **Request For Information** to the **Print Queue**, click **OK** to close the window.

5. Print Queue

To access the **Print Queue** on the main menu, locate and click on **Output**. From the drop down menu select and click on **Print Queue**.


The **Print Queue** window allows you to direct documents to a centralized location as you work through the eligibility process or any other activities in ACE. The **Print Queue** holds documents from being routed to the printer as soon as the request is made. This allows the worker to review all documents, or select documents to be sent to the printer. For more information on the **Print Queue**, see the **Print Queue Chapter**.

6. Printing the RFI

When you are ready to print the **RFI**, place a ✔ (check mark) next to the **Description**, then click the **Print** button.

If you do not want all items to be sent to the same person on the **Print Queue** window, click on the form name, not the **Select All** button.

✔ **(Check mark)**
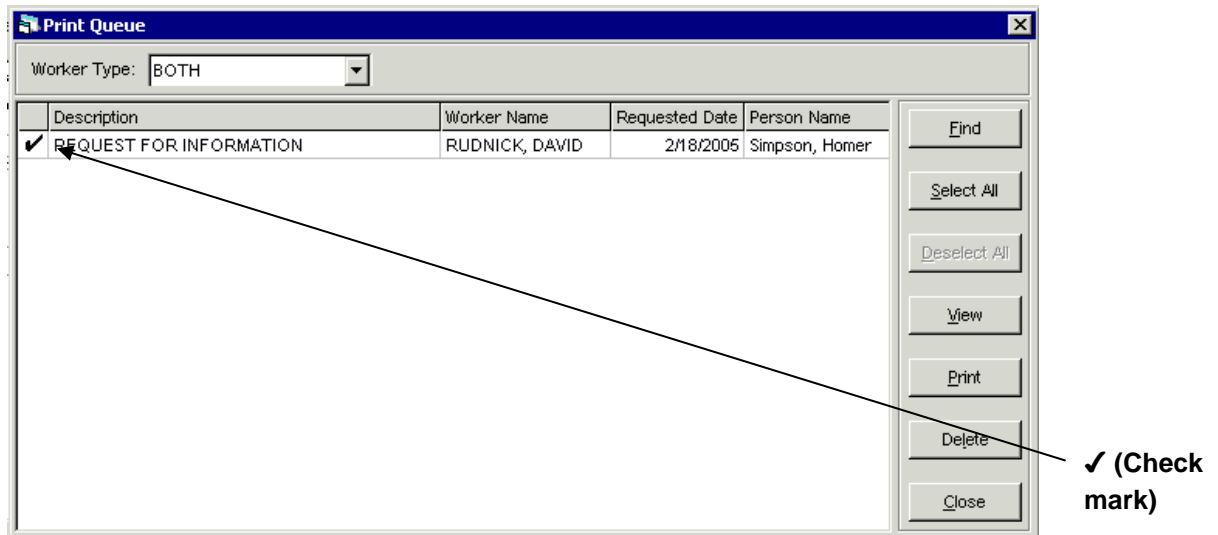
The **Addressee List** pop-up window appears when the **Print** button is selected. This window allows you to select the individual you want the items mailed to, and puts that address on the correspondence. For mailing notices, the **Addressee List** defaults to the appropriate individual (i.e. Primary Informant).
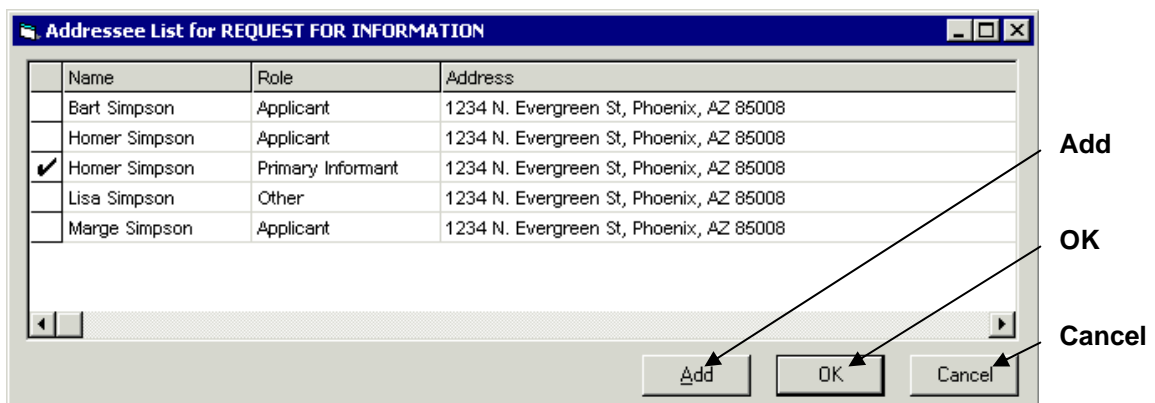
The **Addressee List** pop-up window contains the following fields:

- **Check Box**   A ✔ (check mark) to the left of the individual's name indicates the person to whom the items are mailed. The ✔ (check mark) may be removed, or added to an additional name, by clicking on the name of the individual.

- **Name**   Displays the group members.

- **Role**   Displays the role of the individual in the case.

- **Address**   Displays the address of the individuals in the case. For mailing verifications the address will contain the common addresses for businesses. For example, Bank of America will contain the central address.
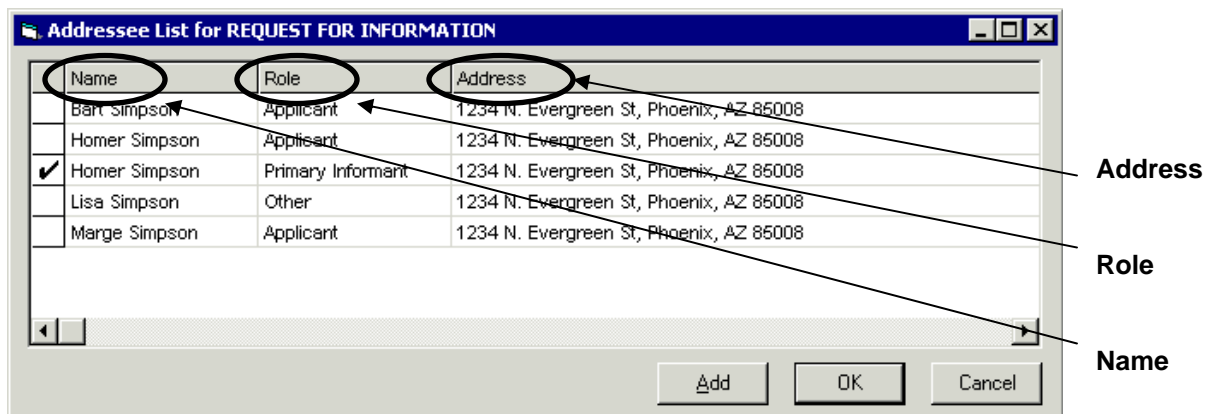
The **Addressee List** pop-up window contains three buttons:

- **Add**   Allows you to add an individual, and address of an individual not part of the group. Adding an individual is described on the following page.

- **OK**   This function only *sends* the document to your printer. At the printer, you will then need to enter your 4-digit ID. All documents you sent to print will now generate.

- **Cancel**   Cancels the request for printing.

The **Add Addressee** window opens when the **Add** button is clicked on the **Addressee List** pop-up window.

The **Add Addressee** window has the following fields:

- **First Name**   Type in the first name of the individual being added.

- **MI (Middle**   Type in the middle initial of the individual being

	Initial)	added.
•	**Last Name**	Type in the last name of the individual being added.
•	**Street 1**	Type in the street address of the individual being added.
•	**Street 2**	Type in the name of the institution, etc., if applicable.
•	**City**	Type in the city of the individual being added.

	State	Select the state of the individual being added by using ▼ (down arrow) to view the drop down box.
•	**Zip Code**	Type in the zip code of the individual being added.

The **"Add Addressee"** window also has two buttons:

	OK	Saves and adds the information, and closes the pop-up window. Sends the document to the printer.
•	**Cancel**	Does not save the information, and closes the pop-up window.

The documents do not automatically print. When you click the **OK** button on the **Add List** window or the **Add Addressee** window, this only *sends* the document to your secured printer. At the printer, enter your 4-digit ID. All documents you sent to print will now generate.

- **Print**   Sends the item(s) to the printer. Does not give a print preview as seen with **View**.

- **Delete**   Deletes the form from the print queue. Does not print the form, and cannot be retrieved once deleted.

- **Close**   Closes the **Print Queue** window.

Print

Delete

Close
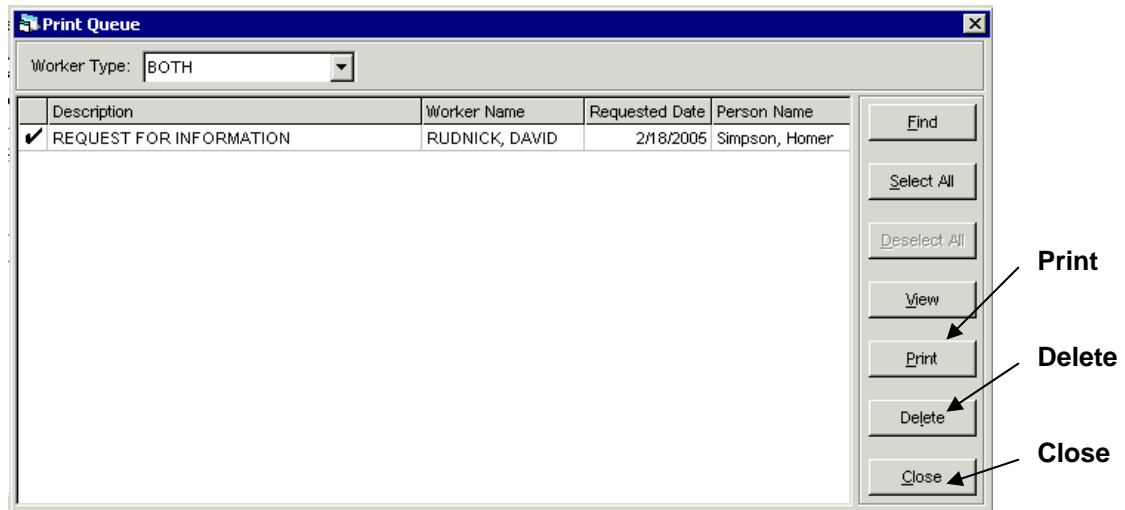
7. Revising the RFI

When a second RFI is needed you may remove and/or add items to the RFI and reissue the form.

If the customer or representative provide only part of the requested information ACE allows you to leave the requested form or verification on the RFI. You may also add new forms or request for verification to the RFI.

To remove an item from the RFI, select the item on the form or verification, click on the item causing it to highlight.

Select Item
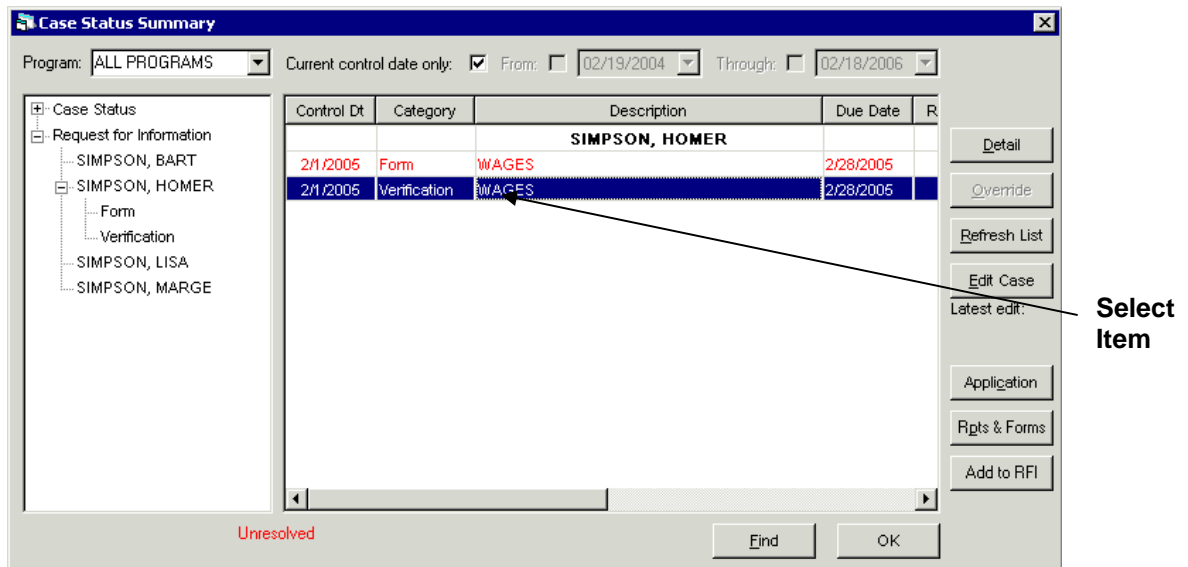
Double click on the item opens the detail window from which it originated.

If the customer or representative returned the form, (for example the form is Verification – Financial Accounts) with their signature, in the **Form** grid, Resolved field, enter the date the form is received.

You may either use the drop down calendar to select the date, or type in the date.

Clicking **OK** resolves the request and closes the detail window.

After resolving the request on the detail window, remove the item from the **Case Status Summary** window by clicking the **Refresh List** button on the **Case Status Summary** window.

To add an addition item to the revised **RFI**, on a verification detail window complete the **Form** and/or **Request For Information** grids. When completed click **OK**.

The Case Status Summary window will reflect the new item. In the above example, verification of income was requested.

On the **Case Status Summary** window, the request for verification of the income is now seen. If you have the **Case Status Summary** open and it does not show, click on the **Refresh List** button.

Request for Verification of Wages

8. Reprinting the RFI

You can reprint the **RFI** to add items or delete items. To reprint the original **RFI** access the **Case Status Summary**. Click on the Rpts & Forms **Rpts & Forms** button. When the **Print Report** window opens select **Request For Information** (causing it to highlight) and click **Print**.
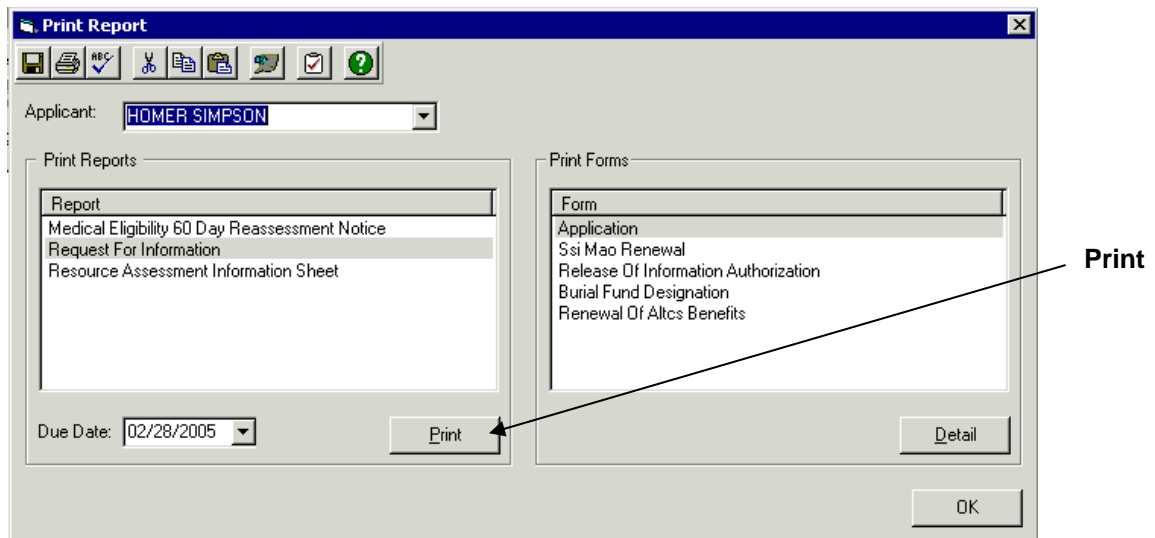
Print

Clicking on the Print button again sends the RFI to the Print Queue where you able to view and reprint the form.

9. Resolving Items on the Case Status Summary

Once verification is received, the item needs to be resolved. On the **Case Status Summary** window, select the **Form** or **Verification** needing to be resolved by clicking on it. Once the item is selected, double click to open the **Form/RFI Detail** window for that specific item.

Select the item that needs to be resolved. In this example, it is wages.

To resolve either an item listed in the **Form** grid or **Request For Information** grid, enter a date in the **Resolved** field. You may either click on the ▼ (down arrow) to view and select a date from the drop down calendar or type in the date.

When you have completed your entries, click **OK** to save the information and close the **Forms/RFI Detail** window.

The **Case Status Summary** window will not reflect the **Resolved** date until you click the **Refresh List**.